



Filing ID #20033754

# PERIODIC TRANSACTION REPORT

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## FILER INFORMATION

**Name:** Hon. Steve Cohen**Status:** Member**State/District:** TN09

## TRANSACTIONS

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	Bank OZK - 4.625% Series A Non-Cumulative Perpetual Preferred Stock (OZKAP) [ST]  FILING STATUS: New SUBHOLDING OF: Stephens Advantage Account	S (partial)	12/17/2025	12/30/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Cohen & Steers Total Return Realty Fund, Inc. Common Stock (RFI) [ST]  FILING STATUS: New SUBHOLDING OF: Stephens Advantage Account	S	12/17/2025	12/30/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	Goldman Sachs Group, Inc. (GS) [ST]  FILING STATUS: New SUBHOLDING OF: Stephens Advantage Account	S (partial)	12/17/2025	12/30/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Goldman Sachs Group, Inc. (GS) [ST]  FILING STATUS: New SUBHOLDING OF: Stephens Advantage Account	S (partial)	12/17/2025	12/30/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Morgan Stanley Common Stock (MS) [ST]  FILING STATUS: New SUBHOLDING OF: Stephens Advantage Account	S (partial)	12/17/2025	12/30/2025	\$50,001 - \$100,000	<input type="checkbox"/>

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

## INVESTMENT VEHICLE DETAILS

- Stephens Advantage Account  
LOCATION: US

## INITIAL PUBLIC OFFERINGS

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Periodic Transaction Report are true, complete, and correct to the best of my knowledge and belief. Further, I CERTIFY that I have disclosed all transactions as required by the STOCK Act.

**Digitally Signed:** Hon. Steve Cohen , 01/14/2026